



| REQUEST FOR PROPOSAL (RFP) – November 22, 2018 | |
|--|--|
| TITLE | Creation of on-line portal – Centralization and Capacity-Building Project for Audiologists and Speech-Language Pathologists |
| SOLICITATION NUMBER | CAASPR – 009 |
| SOLICITATION CLOSING DATE | <i>December 18, 2018 - 12:00pm CST</i> |
| SEND PROPOSAL TO | Taras Luchak (Project Manager) E-Mail: tluchak@mymts.net *Please reference the Solicitation Number in the subject line of your email. |

| | |
|--|-------------|
| VENDOR/FIRM NAME: | |
| ADDRESS: | |
| TELEPHONE NO.: | |
| E-MAIL: | |
| FAX NO.: | |
| NAME AND TITLE OF PERSON AUTHORIZED TO SIGN ON BEHALF OF VENDOR/FIRM (PLEASE PRINT) | |
| SIGNATURE | DATE |
| <hr/> THE SIGNATURE INDICATES ACCEPTANCE OF THE TERMS AND CONDITIONS SET OUT HEREIN | <hr/> |

COMPLETE, SIGN AND INCLUDE WITH YOUR TECHNICAL PROPOSAL



SECTION A

BIDDER INSTRUCTIONS, INFORMATION AND CONDITIONS

This request for proposal (RFP) is issued by the Canadian Alliance of Audiology and Speech-Language Pathology Regulators (CAASPR).

1. ACCEPTANCE OF TERMS AND CONDITIONS

The first page must be signed by the Bidder or by an authorized representative of the Bidder. The signature indicates that the Bidder agrees to be bound by the instructions, information and conditions in their entirety as they appear in this RFP. No other terms and conditions included in the Bidder's proposal will be applicable to the resulting contract notwithstanding the fact that the Bidder's proposal may become part of the resulting contract.

In the event of a proposal submitted by a joint venture, the proposal shall either be signed by all members of the joint venture or a statement shall be provided to the effect that the signatory represents all parties of the joint venture.

2. ENQUIRIES REGARDING THE BID SOLICITATION

To ensure the integrity of the competitive bid process, enquiries and other communication regarding this procurement are to be directed **only** to the Contracting Authority in writing. Enquiries and other communication are not to be directed to any other official(s). Failure to comply with this condition during the solicitation period may (for that reason alone) result in the disqualification of the proposal.

Enquiries **MUST** be received **no later than seven (7) calendar days** prior to bid closing date to allow sufficient time to provide a response. Enquiries received after that time may not be answered prior to the bid closing date.

3. PROPOSAL COSTS

No payment shall be made for costs incurred in the preparation and submission of a proposal in response to this RFP.

No costs incurred before receipt of a signed contract or specified written authorization from the Contracting Authority can be charged to any resultant contract.



4. REVISIONS

After the RFP closing date, no revisions to the proposal or additional documentation will be accepted, unless requested by the Contracting Authority. During the evaluation, the Contracting Authority may, at their discretion, submit questions to Bidders to obtain clarifications.

5. RIGHTS OF CAASPR

CAASPR reserves the right to:

- a. reject any or all proposals received in response to this RFP (**CAASPR's willingness to proceed will be highly dependent on projections related to both cost and timing.**) ;
- b. enter into negotiations with Bidders on any or all aspects of their proposal;
- c. accept any proposal in whole or in part without negotiations;
- d. cancel and/or reissue this RFP at any time;
- e. seek clarification and verify any or all information provided with respect to this RFP;
- f. negotiate with the sole compliant Bidder to ensure best value to CAASPR;
- g. negotiate contract terms upon selection of chosen Bidder;
- h. award the project upon signing of an agreement or contract, which outlines terms, scope, budget and other necessary items; and
- i. submit contracts for review by CAASPR legal counsel

6. APPLICABLE LAWS

Any resulting contract shall be interpreted and governed, and the relations between the Parties determined, by the laws in force in the Province of Ontario, Canada.

7. PRIVACY

- a. The Contractor shall maintain all information relevant to the project.
- b. All information shall be destroyed in accordance with any instructions issued by CAASPR.



- c. The Contractor shall notify CAASPR immediately after they become aware that a breach of any provision of this contract governing the protection of personal information has occurred.
- d. Any intentional breach by the Contractor of any provision of this contract governing the protection of personal information constitutes a fundamental breach of contract such that the contract may be terminated by CAASPR.

SECTION B

SUBMISSION AND PREPARATION OF PROPOSALS

1. SUBMISSION OF PROPOSAL

When responding, the proposal **MUST** be delivered to the following email address, by the time and date indicated on the covering page of this RFP document:

E-MAIL : tluchak@mymts.net

Due to the nature of this solicitation, electronic transmission of a proposal by such means as facsimile or commercial telex is not considered to be practical and, therefore, will not be accepted.

The Bidder's name and return address, the solicitation number and the solicitation closing date and time should be clearly visible on documents containing the proposal. Proposals submitted in response to this RFP will not be returned. It is the Bidder's responsibility to ensure their proposal and all associated documents are received in full and on time. It is advised that Bidders send the proposal in advance of the closing time to ensure confirmation of receipt.

2. PREPARATION OF PROPOSALS

Bidders shall prepare a proposal on 8 ½ x 11 paper, addressing all the requirements of this RFP.

It is requested that the Bidders submit their proposal in three parts (A, B, and C).

Part A – Technical Proposal (**with no reference to price**): one soft copy - as referenced in Section F of this RFP



Part B – Financial Proposal: one soft copy – as referenced in section D of this RFP

Part C – Certification and Other Information: one soft copy – as referenced in section E of this RFP.

A – TECHNICAL PROPOSAL

The technical proposal should follow specific instructions as they are presented in Section F.

B – FINANCIAL PROPOSAL

ALL INFORMATION RELATED IN ANY WAY TO PRICE IS TO APPEAR ONLY IN THE FINANCIAL PROPOSAL.

Bidders are to submit their financial proposal in accordance with the following:

- a. For Canadian-based bidders, prices must be in Canadian funds with excise taxes as applicable included,
- b. For foreign-based bidders, prices and applicable taxes must be in Canadian funds
- c. The total estimated amount of GST or HST is to be shown separately, as applicable.

C - CERTIFICATIONS

Bidders are requested to sign and submit the attached certifications.



SECTION C

CONDITIONS PRECEDENT TO CONTRACT AWARD

In order to be considered for contract award, a bidder whose proposal is technically and financially responsive, must comply with the following conditions and must provide the necessary documentation to support compliance.

CONTRACT CAPACITY

The Bidder shall have the legal capacity to contract. If the Bidder is a sole proprietorship, a partnership or a corporate body, the Bidder shall provide a statement indicating the laws under which it is registered or incorporated together with the registered or corporate name and place of business. In the case of a joint venture, the names and addresses of each member of the joint venture must be provided and the bid must clearly state that it is submitted as a joint venture.



SECTION D

FINANCIAL PROPOSAL

1. PROJECT TITLE

Creation of on-line portal – Centralization and Capacity-Building Project for Audiologists and Speech-Language Pathologists.

2. FINANCIAL CONTENT

The Undersigned hereby agrees to provide to CAASPR all expertise, materials and other things necessary to the satisfaction of CAASPR, for the work as described in the RFP.

3. FINANCIAL PROPOSAL

The financial proposal **MUST** be submitted **IN CANADIAN FUNDS**.

TOTAL PROJECT COST

| TOTAL TENDERED PRICE CANADIAN FUNDS | |
|--|-----------|
| Total Tendered Price | \$ |
| GST / HST / QST | \$ |
| Total Tendered Price (GST / HST / QST included) | \$ |

4. BUDGET MAXIMUM

The maximum available amount in the CAASPR budget for this project is **\$80,000 CAD (including all applicable taxes and expenses)**. If in your opinion, an adaptation of an off the shelf application might suit our purposes, we would be prepared to entertain such a proposal.

Please provide any other financial information or detail relevant to the budget for the project.



5. **METHOD OF PAYMENT**

Payment shall be made within thirty (30) days following the date on which an invoice and substantiating documentation are received according to the terms of the contract. A payment schedule will be negotiated with the successful bidder as part of the contracting process.

6. **INVOICING INSTRUCTIONS**

Invoices shall be submitted monthly to the Chair of CAASPR or as otherwise directed by the Project Manager.

7. **TRAVEL COSTS** Any travel required to complete the described work or present findings to key stakeholders will be authorized by CAASPR. Travel expenses will be reimbursed at cost as per CAASPR policies.



SECTION E

CERTIFICATIONS

Bidders are instructed to append all four certifications to proposals.

1. BIDDER CERTIFICATION

We hereby certify that all information provided herein is accurate. Furthermore we have satisfied ourselves that the personnel proposed by us for this requirement is capable of satisfactorily performing the requirement described herein. In addition, we certify that individuals proposed will be available until completion of the project. Also that the work specified herein can be met in a timely manner, and will be achieved within the time frame and budget allocated.

Signature of Authorized Representative

Date

2. VALIDITY PERIOD

The Undersigned agree(s) that this Proposal will remain firm for a period of 90 calendar days after the proposal closing date.

Signature of Authorized Representative

Date



3. EDUCATION AND EXPERIENCE

The Bidder hereby certifies that all the information provided in the résumés and supporting material submitted with its proposal, particularly as this information pertains to education achievements, experience and work history, has been verified by the Bidder to be true and accurate. Furthermore, the Bidder warrants that the individuals proposed by the Bidder for the requirement are capable of satisfactorily performing the Work described herein.

Should a verification by CAASPR disclose untrue statements, CAASPR shall have the right to declare the proposal non-responsive and, pursuant to the default provisions of any resulting contract, terminate any such contract for default.

Signature of Authorized Representative

Date

4. STATUS AND AVAILABILITY OF RESOURCES

The Bidder certifies that, should it be requested to provide services under any contract resulting from this solicitation, the persons proposed in its proposal will be available to commence performance of the work as required by CAASPR and at the time specified within or agreed to with CAASPR.

If the Bidder has proposed any person in fulfillment of this requirement who is not an employee of the Bidder, the Bidder hereby certifies that it has the written permission from such person to propose his/her services in relation to the Work to be performed in fulfillment of this requirement and to submit such person's résumé to CAASPR.



Signature of Authorized Representative

Date

SECTION F

STATEMENT OF WORK/TERMS OF REFERENCE

1. ISSUER

This Request for Proposals is issued by the Canadian Alliance of Audiology and Speech-Language Pathology Regulators (CAASPR).

CAASPR is comprised of regulatory bodies that have been established and mandated by their provincial governments to regulate the practice of audiology and speech-language pathology and govern their members in their respective provinces. CAASPR's mandate is to address common regulatory issues on a national level to advance the practice and regulation of audiology and speech-language pathology in Canada. CAASPR facilitates the sharing of information and building of consensus on regulatory issues to assist member regulators in fulfilling their mandate of protecting the public interest. Member regulators include:

- Alberta College of Speech-Language Pathologists and Audiologists
- College of Audiologists and Speech-Language Pathologists of Ontario
- College of Speech and Hearing Health Professionals of British Columbia
- College of Audiologists and Speech-Language Pathologists of Manitoba
- New Brunswick Association of Speech-Language Pathologists and Audiologists
- Ordre des orthophonistes et audiologistes du Quebec
- Saskatchewan Association of Speech-Language Pathologists and Audiologists.
- The College of Audiologists and Speech-Language Pathologists Newfoundland and Labrador

2. OBJECTIVES

In October 2016, CAASPR was awarded funding from Employment and Social Development Canada (ESDC) to undertake a series of initiatives under the umbrella of the "Centralization and Capacity-Building Project for Audiologists and Speech-Language Pathologists".

The overriding purpose of this omnibus project is to centralize functions related to the assessment of International Applicants (IA) under a single body (CAASPR) in an effort to better standardize outcomes. This also involves developing and refining certain tools to support the assessment process as well as establishing a high-stakes entry – to - practice assessment. A number of activities need to occur to effectively accept and process IA applications in a



centralized fashion. Note that all aspects of the centralization process described herein refer to both professions: audiology (AUD) and speech-language pathology (SLP). The outcome sought

is a consistent approach to the licensing of internationally-trained applicants so as to enhance public protection.

Key deliverables associated with the “Centralization” project” include:

- Updated professional competency profiles and performance indicators;
- Development of a competency-based national entry-to-practice examination;
- **Creation of a national, online portal for applicants;**
- Establishment of regulator-accepted language tests and benchmarks;
- Development of a mentorship model;
- Development of a business plan.

A **key component** of this work (highlighted above) involves the development of an online web portal which is described further in the next section.

It is a necessary prerequisite that any designed site be hosted in Canada.

CAASPR seeks the expertise of an experienced web architect/designer in order to achieve these objectives, more fully described later in this document.

3. TASKS/DELIVERABLES

The successful bidder is expected to engage in a series of consultations with stakeholders in support of the work described, as deemed necessary. Such consultation may include:

- Preliminary meeting (1.5 hours) by video conference with the Registrars of CAASPR (8 individuals);
- Follow up meeting (1.5) hours with the Registrars of CAASPR (8 individuals);
- Ongoing consultation with the Project Manager and any CAASPR committee created for this purpose;
- Consultation with the exam vendor (SAC) with respect to interconnectivity matters related to the exam provider;
- Individual contact with eight jurisdictions related to “communication” with their online registration systems;
- Staff training.



A **key component** of this work involves the development of an online web portal which allows for the following functionality:

a. A source of information for applicants to seek information related to licensing and registration in all Canadian regulated jurisdictions;

The portal will serve as a pre-arrival resource which will include:

- i) A checklist of items which will help the potential applicant determine if they are ready for potential registration in a Canadian jurisdiction;
- ii) Registration information related to all eight regulated jurisdictions.

b. A portal that allows applicants to submit documents in a secure manner, such documentation to be reviewed by a screening panel, in order to determine eligibility to write a national entry-to-practice examination;

A potential user of the system (the applicant) will need:

- i. the ability to create an on-line profile on the site,
- ii. the ability to create a unique ID number and account on the site for submission and storage of their data and documents,
- iii. to complete the application form,
- iv. to submit required documentation on-line,
- v. the ability to make online payment of the associated fee.

The type of documentation being submitted to the site would include:

- i. evidence of language proficiency;
- ii. **demonstration of “substantial equivalency of formal education to accredited Canadian educational institutions”;**
- iii. submission of educational documentation:
 - Degree certificate;
 - Transcripts;
 - Third-party credential assessment.

Secure login should be accommodated as well as pass/fail password encryption.

c. A vehicle by which the portal administrators can securely transfer lists of eligible candidates to an external exam vendor (Speech-Language & Audiology Canada – SAC). It is anticipated that this will entail about 600 candidates in a calendar year;



The site will need to provide information to SAC related to:

- i. name;
- ii. unique ID number;
- iii. contact information;
- iv. verification of personal identification.

By way of additional information, the exam vendor (SAC) advises that their site was developed in 2014 as a V2.0. API compatibility/integration is required.

d. An ability for the exam vendor to securely transmit historical data for retention on a database housed on the centralized portal;

It is contemplated that the exam vendor will transmit the following information back to the portal:

- i. first and last name;
- ii. system assigned ID number;
- iii. birthdate;
- iv. appeal information;
- v. exam status;
- vi. exam results;
- vii. and any other relevant information.

e. The creation of a database retention of historical data on each applicant.

An applicant tracking and management program will be required, whether this be an adaptation of an off the shelf software program or a customized version. The RFP bidder is encouraged to describe whether an off the shelf adaptation would be suitable for the purposes described.

f. The ability for CAASPR staff to access stored data and revise content on the site.

It is contemplated that CAASPR would work on an ongoing basis with the consultant to update website graphics and other technical information, but that content management could be undertaken by CAASPR staff.

g. Continuing maintenance, security, and monitoring of the site.

What costs are contemplated for managed services and IT infrastructure? CAASPR currently maintains a simple informational website that may or may not be suitable for use as the integrated portal. It is a WordPress site with member only accessible



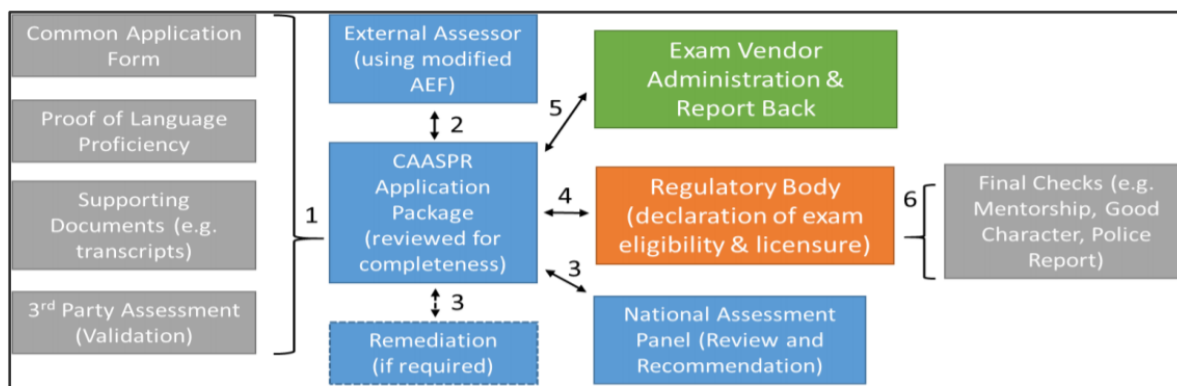
documents stored on google drive. The site is hosted on GoDaddy. Advice is sought as to whether the creation of a new portal site is recommended (with a link from the existing CAASPR) site.

What will be the annual contemplated fee for ongoing maintenance and management of the site? What will be included in this fee? Is there an additional fee for tech support? Will there be an additional fee for training of staff?



4. PORTAL PROCESS

The process for international applicants is diagrammed as follows:



As outlined in this chart, the assessor(s) will need the ability to view the application information submitted (far left) and then have the ability to communicate a list of eligible applicants to the exam vendor.

There are a number of steps in this process for an international applicant:

- a) Information gathering;
- b) Submission of documentation;
- c) Review by assessor(s);
- d) Determination of eligibility for the examination and communication of this information to the exam vendor (SAC);
- e) Registration for the Examination with the exam vendor SAC via a link to the SAC web site;
- f) Communication of results from SAC to the CAASPR portal.

While this RFP does not deal with all of these steps, it will be necessary to introduce a process of identity matching and identity verification. Beginning with the submission of documentation phase, it will be necessary to introduce an efficient means of personal identification (and requisite security associated with receipt and retention of this personal information).

As noted, the site must facilitate the ability of assessor(s) to review the documentation which has been submitted by the applicant.

This portal would include significant back-end functionality allowing for: the storing of applicant information and scanned documents, communication (between CAASPR administrators,



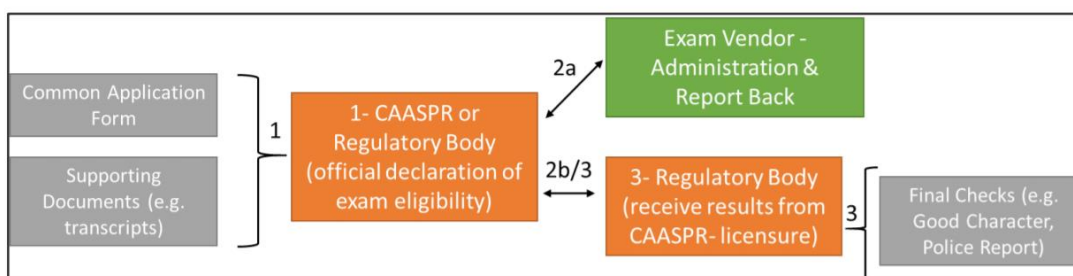
regulatory college staff, credential assessors and national assessment panel members), and customized “dashboards” for all major user groups.

Different groups of stakeholders and staff will require differing levels of access/authorizations to information (on a need to know basis). Likewise differentiation between “view only” and “edit” functions.

Consideration should be given to the functionality which provides a built-in audit function. E.g. when anyone views or updates an applicant file it should be logged for privacy, security, and chain of custody purposes.

The process for Canadian applicants is similar but includes exemptions which mean fewer documents to upload to the portal.

The figure below illustrates the process.



5. ADDITIONAL INFORMATION/QUESTIONS

- a. If for some reason, the successful consultant is unable to finish the project, does the consultant have a succession plan in place? What is that plan?
- b. What is the succession plan if the site/portal needs updating in the future and the developer is not available?
- c. What portions of the site can be maintained on an ongoing basis by CAASPR?
- d. What training will the consultant provide to CAASPR staff with respect to the operation of the site and potential hands on portions of the site?
- e. Will the site be search engine optimized?
- f. Will the developer continue to monitor search engine optimization post-initial development, and for how long?
- g. Have you previously produced a site/portal comparable to the one being described in this project?
- h. CAASPR will require a detailed proposal with respect to an appropriate content management system.
- i. What access will the project manager/CAASPR have to the site during the development phase of the project? i.e. issues related to design and functionality?
- j. What is the proposed schedule for testing?



- k. If the execution of the proposed work requires the hiring of subcontractors you must clearly state this in your proposal. Sub-contractors must be identified and the work they will perform must be defined.
- l. In the final analysis, the completed site must be flexible, informative and will require versions in both the English and French languages.

6. QUALIFICATIONS/EXPERIENCE

- a. Please list the five web sites your firm has produced that best reflect your work and relevance to this project. Briefly list the role your firm played in each project.
- b. Describe your experience in producing sites for regulatory focused projects.
- c. Provide current reference information for three former or current clients.
- d. Briefly describe your firm's organizational capacity to produce our web site.
- e. Provide a company profile, length of time in business and core competencies.

7. TENTATIVE TIMING

The timing associated with the work described is summarized in the table below. Bidders are encouraged to suggest adjustments/alterations to this schedule in their proposals.

| Timing | Activity | Responsibilities |
|-------------------------------|---|---------------------------|
| November 21, 2018 | RFP Issued | CAASPR |
| December 18, 2018 | RFP closing date – bids submitted | Bidders |
| January 8, 2019 | Vendor chosen | CAASPR |
| January 22, 2019 | Contract for services completed | CAASPR, consultant |
| By February 5, 2019 | Initial meeting with Registrars Committee | CAASPR, consultant |
| February – April, 2019 | Research phase (Requirements planning & site definition) | Consultant |
| By May 15, 2019 | Draft report submitted | Consultant |
| By June 3, 2019 | Review of draft report via teleconference | CAASPR, consultant |
| July-August, 2019 | Site Development, Testing and Deployment | Consultant |
| September 16, 2019 | Ready to launch | CAASPR, consultant |



8. TECHNICAL PROPOSAL FORMAT

The proposal is not to exceed eleven (11) pages in length, (exclusive of curriculum vitae) and must include the following five (5) components:

- a. An introductory section that describes the intended methodology and shows that the bidder clearly understands the scope and intent of the project and how to approach this type of work;
- b. A work plan detailing specific timelines (comments/alternatives), communications, personnel and associated costs;
- c. A brief account of any similar projects the applicant has completed in the past with specific attention to those dealing with similar research;
- d. 2-3 references of clients from similar projects CAASPR may contact at its discretion; and
- e. Curriculum vitae/bio of all personnel involved (this may be appended).

SECTION G

EVALUATION PROCESS

1. MANDATORY REQUIREMENTS

The mandatory requirements listed will be evaluated on a pass / fail (i.e.: compliant / noncompliant) basis. Proposals that fail to meet the mandatory requirements will be discarded at this stage without further consideration.

Proposals must demonstrate compliance with all of the following specifications and requirements and must provide the necessary documentation to support compliance in order to be considered.

2. BASIS OF SELECTION

The project team will use the following criteria to evaluate the Technical Proposal:

- Understanding of requirements – the proposal demonstrates that the respondent has a clear understanding of the scope and nature of the work required;
- The depth and degree of relevant experience related to the objectives and deliverables of this RFP;



- The ability of the proposal to outline a reasonable timeline and methodology for completion;
- Whether the bidder has experience in producing sites for not for profit, regulatory or health care focused projects;
- Overall qualifications and related experience – of both the organization (if applicable) and the individual(s) assigned to the project;
- The understanding that any proposed site be hosted in Canada;
- The ability of the bidder to provide post-project training and support;
- References from clients for whom the consultant has completed similar work;
- Reasonableness of costs for proposed methods/approach.

The basis of selection will be the highest **combined rating of technical merit and price.**

- The compliant bidder with the highest combined rating of technical merit (combination of technical section and Bidder experience section) (**weighted at 80%**) and price (**weighted at 20%**) shall be selected as the preferred Supplier.